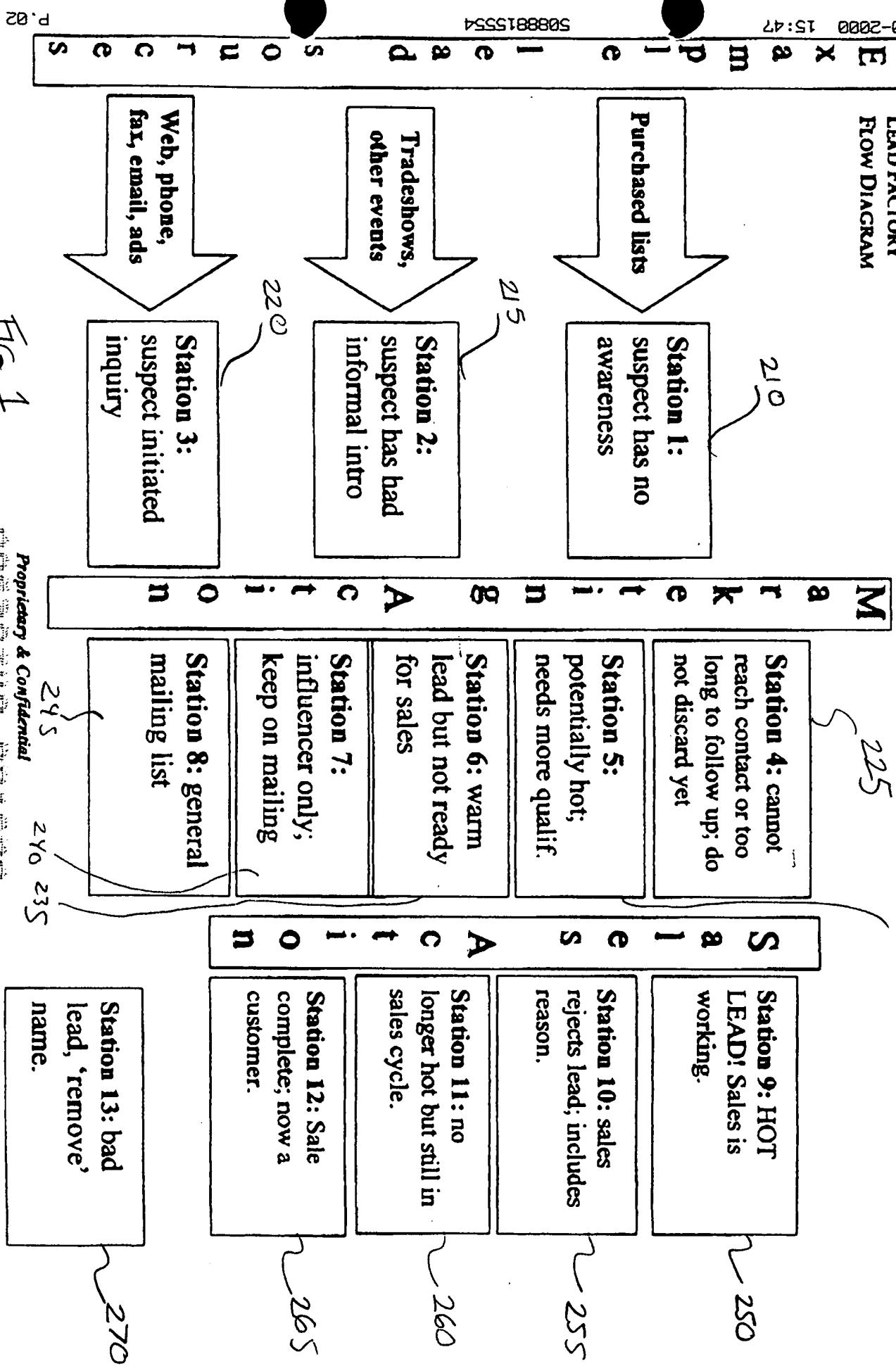


LEAD FACTORY
FLOW DIAGRAM

Administration



Change Company Info

~28



Add/Change Users

~24



Add/Change Sources

~26



Change Station Definitions

~28

Tutorial



FIG. 2

42 44 46

32 33 34 35 36 37

Admin **Users**

First Name: 32

Last Name: 33

Email: 34

User Name: 35

Password: 36

Company: 37

User Rights

User

Administrator

38

Select Username

Select Company



FIG. 3

4.8



Station Definitions

S1 : **Unaware Lead** : These are people who probably don't know anything about your company or product(I.e. from mailing lists).

S2 : **Somewhat Aware** : These are people who probably don't know anything about your company or product(I.e. from tradeshows).

S3 : **Aware Lead** : Inbound inquiry, Suspect have taken an action to get introduced to your company.

S4 : **Unable to contact** : Attempts are being made but no contact has resulted.

S5 : **Unqualified** : This person has been formally introduced to your company but remains unqualified at this time.

S6 : **Warm Lead** : Warm lead, not ready for sale yet. Requires further marketing qualification.

S7 : **Influencer not primary contact** : This is not the key contact but someone who may influence a sale. Keep on marketing to this person.

S8 : **Mailing List** : General mailing list

S9 : **Hot Lead** : Hot Lead! Passed to sales for close.

S10 : **Rejected Lead** : Sales rejects lead; includes reason

S11 : **In pipeline** : Still in the sales pipeline but not considered hot.

S12 : **Sale Complete** : Sale complete! now a customer.

S13 : **Bad Lead** : Bad lead

Fig. 4

Admin

Station 1 Definition



S1 : Unaware Lead:
These are people who probably dont know anything about your company or product(I.e. from mailing lists).

Stationmaster: admin

52

Stationmaster may reassign to: Sarah

54

The duration a lead may remain in this station is: 1 days.

Once leads expire, send an email to: admin

53

Should leads remain in that station 1 week after

admin

62

the first email is sent, send another email to:

64

If no response after one more week, move leads to station:

Save

66

FIG. 5

Form fields with handwritten labels:

- New source name
- Description
- Source
- Description
- Station
- Description
- Station

Handwritten labels and additions:

- Handwritten label "C8" is written next to the "Save" button for the "76" entry.
- Handwritten label "70" is written next to the "Add a Source" button.

FIG. 6

add a name

92 **Company** **Division** **94**

92 **Contact First Name*** **Contact Last Name*** **94**

Title

Address

Street Name

City

State/Province

Zip/Postal Code

Country

Comment

96 **Source*** **Add New Source**

Station Primary*

Assigned to

Clear **Submit** **Exit**



Fig. 7



1. Create a new map

New Map

108

2. Assign

Station: S1 : Unaware Lead

Source: Chicago Tribune

3. Select an existing map

102

96

Select an existing Map

104

Next
106

Fig. 8

Import List



1. Select a file to import:

112

114

118

FIG. 9

To narrow search, check one or more boxes and enter criteria:

Contact first name 122

Contact last name 124

Company name 126

Source 128

Station 130

Date entered 134

Starting from: mm - dd - yyyy

Ending:

mm - dd - yyyy

Assigned To 136

Select source 138

Select station 138

Select user 138

140

FIG. 10

Select a
Report:

By Chicago Tribune ~ 310
Source: Boston Herald
USA Today

314

325

By S1 : Unaware Lead
Source: S2 : Somewhat Aware
Station: S3 : Aware Lead

316

By Chicago Tribune
Source: Boston Herald
USA Today

318

325

By S1 : Unaware Lead
Source: S2 : Somewhat Aware
Station: S3 : Aware Lead

320

By Aging
Source: Boston Herald
USA Today

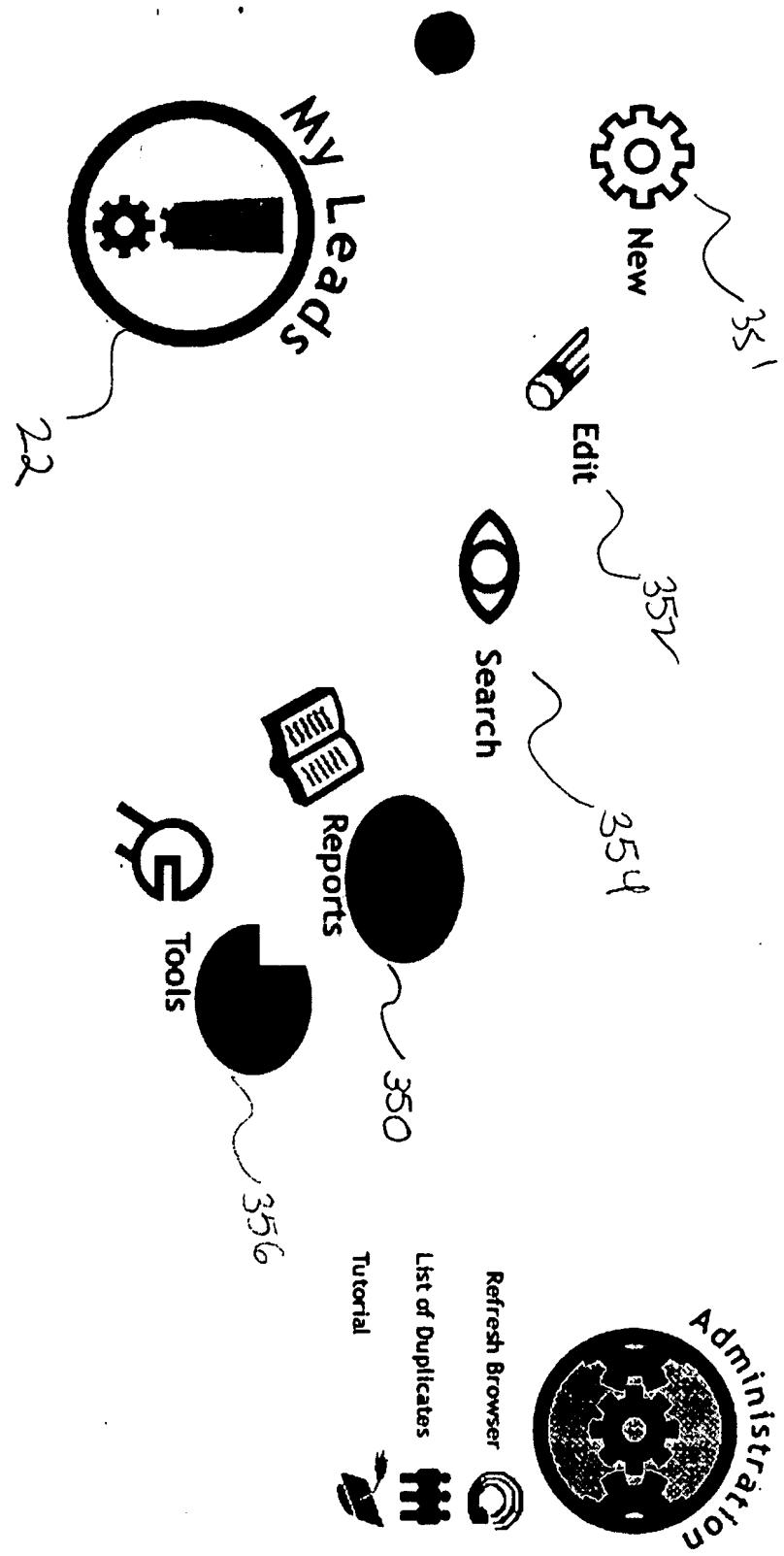
320

320

FIG. 11

http://216.59.35.248:8080/examples/holead/refreshHomepage.html

Fig 12



AutoGen Reporting

Review existing autogen 360

Previous Users Select to Delete 364

Select Report 370

Select User To Delete 376

Create New Report 376

368 DateRange: Select One 372

Last 24 hours

1 Week prior

1 Month Prior

3 Months prior

6 Months prior

1 Year prior

Since system inception

Frequency of update: 372

Once a day

Once a week

Once a month

Once a quarter

Fig. 13

FIG. 14

My Leads

Name	Title	Company	Address	Phone	Email	Station	Sou	
John Cussack			None	N/A ; N/A N/A N/A N/A		S2 : Somewhat Aware	Chic: Trib	
Tarun Sharma			Sedona	N/A ; N/A Alabama N/A N/A		S2 : Somewhat Aware	Chic: Trib	
Sam0 Shepherd0	Dr		None	0 ; 0 0 N/A	0 0 00	S4 : Unable to contact	Chic: Trib	
Sam1 Shepherd1	Dr		None	1 ; 1 1 N/A	1 1 11	S4 : Unable to contact	Chic: Trib	
crazy0 dev0	web		None	0 ; 0 0 N/A	0 0 00	S4 : Unable to contact	Chic: Trib	
crazy1 dev1	web		None	1 ; 1 1 N/A	1 1 11	S4 : Unable to contact	Chic: Trib	
achmed0 boolad0			runnermansinglier	None	0 ; 0 0 N/A	0 0 00	S4 : Unable to contact	Chic: Trib
achmed1 boolad1			runnermansinglier	None	1 ; 1 1 N/A	1 1 11	S4 : Unable to contact	Chic: Trib
ed0 lane0	WAZZUPGUY		None	0 ; 0 0 N/A	0 0 00	S4 : Unable to contact	Chic: Trib	
ed1 lane1	WAZZUPGUY		None	1 ; 1 1 N/A	1 1 11	S4 : Unable to contact	Chic: Trib	
cool0 kid0	coolman		None	0 ; 0 0 N/A	0 0 00	S4 : Unable to contact	Chic: Trib	
cool1 kid1	coolman		None	1 ; 1 1 N/A	1 1 11	S4 : Unable to contact	Chic: Trib	
bob0 woodizergizerman0	nothing		None	0 ; 0 0 N/A	0 0 00	S4 : Unable to contact	Chic: Trib	
bob1 woodizergizerman1	nothing		None	1 ; 1 1 N/A	1 1 11	S4 : Unable to contact	Chic: Trib	
mystery0 man0	hmmmm		None	0 ; 0 0 N/A	0 0 00	S4 : Unable to contact	Chic: Trib	

Act On A Lead

Company	<input type="text" value="Coke"/> 402	Division	<input type="text" value="Select Division"/> 406
Contact First Name*	<input type="text" value="Adam"/> 414	Contact Last Name*	<input type="text" value="Greisman0"/> 412
Title	<input type="text" value="CTO"/> 418	Other Contacts	<input type="text" value="Adam0 Greisman0"/> 412
Address	<input type="text" value="2310 NYCO NYO 018030 info@coke.com"/> 422		
Street Name	<input type="text" value="2310"/> 0	Cell Phone	<input type="text" value="0"/> 422
City	<input type="text" value="NYCO"/> 0	Other Phone	<input type="text" value="0"/> 422
State/Province	<input type="text" value="NYO"/> 0	Fax	<input type="text" value="0"/> 422
Zip/Postal Code	<input type="text" value="018030"/> 0	Country	<input type="text" value="USA"/> 422
Email	<input type="text" value="info@coke.com"/> 422		
Comment	<input type="text" value=""/>		
Source*	<input type="text" value="USA Today"/> 418	Assigned to	<input type="text" value="admin"/> 422
Station Primary*	<input type="text" value="S2 : Somewhat Aware"/> 422	<input type="button" value="Clear"/> <input type="button" value="Submit"/> <input type="button" value="Print"/>	

Fig. 15

view/edit a name

434

Company	<input type="text" value="None"/> 	Division	<input type="text" value="Select Division"/> 
Contact First Name*	<input type="text" value="430"/> 	Contact Last Name*	<input type="text" value="432"/> 
Title	<input type="text" value=""/>	Other Contacts	<input type="text" value="Select Person"/> 
Address	<input type="text" value=""/>	Office Phone	<input type="text" value=""/>
Street Name	<input type="text" value=""/>	Cell Phone	<input type="text" value=""/>
City	<input type="text" value=""/>	Other Phone	<input type="text" value=""/>
State/Province	<input type="text" value=""/>	Fax	<input type="text" value=""/>
Zip/Postal Code	<input type="text" value=""/>	Email	<input type="text" value=""/>
Country	<input type="text" value=""/>		
Comment	<input type="text" value="438"/> 		
Source*	<input type="text" value="440"/> 		
Station Primary*	<input type="text" value=""/>		
Assigned to	<input type="text" value=""/>		

435

445

450

436

438

440

446. 16

view/edit a company



Company name*	Coke	440
Street address	Nevada St	462
City	Nevada	464
State/Province	New Jersey	466
ZIP/Postal code	18972	468
Country	USA	466
Email	tarun@coke.com	
Url	www.coke.com	
Phone	476 898	
Comments	478 Coke is Coke.....!!	
	<input type="button" value="Save"/>	484
	<input type="button" value="Print"/>	
	<input type="button" value="Cancel"/>	

Fig. 17